

We Claim:

1 A method for providing offers an item constituting a good or a service in the form of offers for purchase of the item to potential customers as users of the system, utilizing an electronic communications device, such as a telephone, videophone or computer, comprising the steps of:

5 establishing communication via the electronic communications device between the user and the system for purpose of a primary transaction,

10 obtaining primary transaction data with respect to the transaction, including determining the identity of the prospective customer,

15 obtaining at least a second data element relating to the user for the upsell determination,

utilizing at least in part the primary transaction data and the second data element and determining at least one good or service item for prospective upsell to the prospective customer, and

20 offering the item to the prospective customer.

2. The method of claim 1 wherein the primary transaction data includes identification data.

25 3. The method of claim 2 wherein the identification data includes user specific data.

4. The method of claim 3 wherein the user specific data includes the user's social security number.

5. The method of claim 3 wherein the user specific data includes the user's electronic address
6. The method of claim 5 wherein the user's electronic address includes an electronic mail (e-mail) address.
7. The method of claim 5 wherein the user's electronic address includes an internet service provider identification.
- 10 8. The method of claim 3 wherein the user specific data includes the user's customer number.
9. The method of claim 3 wherein the user specific data includes the user's electronic signature.
- 15 10. The method of claim 3 wherein the user specific data includes the user's billing data.
11. The method of claim 10 wherein the user's billing data includes a credit card number.
- 20 12. The method of claim 10 wherein the user's billing data includes a debit card number.
13. The method of claim 3 wherein the user specific data includes the user's PIN.
- 25 14. The method of claim 1 wherein the primary transaction data includes user local identification data.
- 30 15. The method of claim 14 wherein the user local identification data is a user's

telephone number.

16. The method of claim 1 wherein the primary transaction data includes transaction type data.

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17. The method of claim 16 wherein the transaction type data indicates a purchase transaction.

18. The method of claim 16 wherein the transaction type data indicates a service transaction.

19. The method of claim 1 wherein the primary transaction data includes primary transaction goods data.

15 20. The method of claim 1 wherein the primary transaction data includes primary transaction service data.

21. The method of claim 1 wherein the electronic communications device is telephonic communication.

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22. The method of claim 1 wherein the electronic communications device is communication through an electronic communication network.

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23. The method of claim 22 wherein the electronic communication network is the internet.

24. The method of claim 1 wherein at least certain of the obtained information includes demographic information.

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25. The method of claim 24 wherein the demographic information includes an

indication of the user's age.

26. The method of claim 24 wherein the demographic information includes an indication of the user's sex.

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27. The method of claim 24 wherein the demographic information includes an indication of the user's income.

28. The method of claim 24 wherein the demographic information includes an
10 indication of the user's occupation.

29. The method of claim 24 wherein the demographic information includes an indication of the user's education level.

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30. The method of claim 24 wherein the demographic information includes an indication of the user's family status.

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31. The method of claim 24 wherein the demographic information includes an indication of the user's lifestyle.

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32. The method of claim 24 wherein the demographic information includes an indication of the user's interests.

33. The method of claim 24 wherein the demographic information includes a
25 coded indication for the user.

34. The method of claim 1 wherein at least certain of the obtained information includes credit data.

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35. The method of claim 34 wherein the credit data is obtained for both the primary transaction and the upsell transaction while accessing the database for the primary

transaction.

36. The method of claim 1 wherein at least certain of the obtained information includes inventory data.

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37. The method of claim 1 wherein at least certain of the obtained information includes possession data.

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38. The method of claim 37 wherein at least certain of the possession data includes set data.

39. The method of claim 38 wherein the set data includes data relating to household items.

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40. The method of claim 37 wherein at least certain of the second data element is obtained from a local database.

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41. The method of claim 40 wherein the database provides raw data.

42. The method of claim 40 wherein the database provides analyzed data.

43. The method of claim 37 wherein at least certain of the second data element is obtained from a remote database.

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44. The method of claim 43 wherein the database provides raw data.

45. The method of claim 43 wherein the database provides analyzed data.

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46. The method of claim 37 wherein at least certain of the second data element is obtained from a calendar.

47. The method of claim 37 wherein at least certain of the second data element is obtained from a clock.

48. The method of claim 37 wherein the system further includes the step of
5 correlating at least certain of the primary transaction data with other identification data.

49. The method of claim 37 wherein the system further includes the step of
correlating at least certain of the primary transaction data with other designators for database
accessing.

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50. The method of claim 1 wherein the step of determining the at least one good
or service item for prospective upsell to the prospective customer, negative rules are applied.

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51. The method of claim 50 wherein the negative rule includes not offering for
upsell an item determined to already be possessed by the user.

52. The method of claim 1 wherein the step of determining the at least one good
or service item is performed in automatic response to the occurrence of a primary transaction.

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53. The method of claim 1 wherein the transaction type of the primary transaction
is different from the upsell transaction.

54. The method of claim 53 wherein the primary transaction is a service
transaction and the upsell is a sales transaction.

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55. The method of claim 53 wherein the primary transaction is a sales transaction
and the upsell is a sales transaction.

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56. The method of claim 1 wherein the step of determining results in determining
more than one good or service item for offer to the user.

57. The method of claim 56 wherein the more than one good or service is presented for selective presentation to the user.
58. The method of claim 57 wherein the selection as to presentation is made by the telemarketer.
59. The method of claim 57 wherein the selection as to presentation is made by the system user.
- 10 60. The method of claim 56 wherein the primary transaction is consummated.
61. The method of claim 56 wherein the upsell transaction is consummated.
- 15 62. The method of claim 56 wherein the upsell transaction supplants the primary transaction.
63. The method of claim 56 where both the primary transaction and the upsell transaction are consummated.
- 20 64. The method of claim 56 wherein if a transaction is consummated, shipping of the item is effected.
65. The method of claim 56 wherein if a transaction is shipped, user accessible tracking information is generated.
- 25 66. The method of claim 56 wherein if a transaction is consummated, billing for the item is effected.
- 30 67. The method of claim 56 wherein if a transaction is consummated, inventory information regarding the item is updated.

68. The method of claim 56 wherein data relating to the upsell is utilized in future determination of upsells.

5 69. A system for the intelligent provision of an item based upon a contact between the user of the system and the system, for the potential provision of an item selected from the group comprising goods and services, comprising:

10 an input collection system for collection and storage of information for use in said intelligent item selection determination, at least certain of the information resulting from primary transaction between the user and the system,

15 an interface for the selective accessing of one or more databases, the interface receiving at least a second data element relating to the user from said databases for use in said intelligent item selection determination,

20 15 a control system for directing the interaction with the user, the said one or more databases, and the item selection system, and

25 20 an item selection system, adapted to receive the inputs from the input collection system, including the primary transaction data, and the interface for the selective receiving information from said databases, including the second data element, under operation of the control system, for the output of at least one item selection, wherein the selection is based at least in part upon primary transaction data and the second, and

25 a provision system for providing information to the customer regarding the upsell.

30 70. The method of claim 69 wherein the input collection system includes an identification data unit.

71. The method of claim 70 wherein the identification data unit receives user specific data.

72. The method of claim 71 wherein the user specific data includes the user's social security number.

73. The method of claim 71 wherein the user specific data includes the user's electronic address.

74. The method of claim 73 wherein the user's electronic address includes an electronic mail (e-mail) address.

75. The method of claim 73 wherein the user's electronic address includes an internet service provider identification.

76. The method of claim 71 wherein the user specific data includes the user's customer number.

77. The method of claim 71 wherein the user specific data includes the user's electronic signature.

78. The method of claim 71 wherein the user specific data includes the user's billing data.

79. The method of claim 78 wherein the user's billing data includes a credit card number.

80. The method of claim 78 wherein the user's billing data includes a debit card number.

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81. The method of claim 71 wherein the user specific data includes the user's PIN.

82. The method of claim 69 wherein the identification data unit receives user local identification data.

5 83. The method of claim 82 wherein the user local identification data is a user's telephone number.

10 84. The method of claim 69 wherein the identification data unit includes a transaction type data unit.

15 85. The method of claim 84 wherein the transaction type data unit receives purchase transaction data.

20 86. The method of claim 84 wherein the transaction type data unit generates an indication of a service transaction.

25 87. The method of claim 69 wherein the primary transaction data includes primary transaction goods data.

88. The method of claim 69 wherein the primary transaction data includes primary transaction service data.

30 89. The method of claim 69 wherein the electronic communications device is a telephonic communication device.

90. The method of claim 89 wherein the telephonic communication device is a touch tone phone.

91. The method of claim 89 wherein the telephonic communication device is a videophone.

92. The method of claim 69 wherein the electronic communications device is communication through an electronic communication network.

93. The method of claim 92 wherein the electronic communication network is the
5 internet.

94. The method of claim 69 wherein at least certain of the obtained information includes demographic information.

10 95. The method of claim 94 wherein the demographic information includes an indication of the user's age.

15 96. The method of claim 94 wherein the demographic information includes an indication of the user's sex.

97. The method of claim 94 wherein the demographic information includes an indication of the user's income.

20 98. The method of claim 94 wherein the demographic information includes an indication of the user's occupation.

99. The method of claim 94 wherein the demographic information includes an indication of the user's education level.

25 100. The method of claim 94 wherein the demographic information includes an indication of the user's family status.

101. The method of claim 94 wherein the demographic information includes an indication of the user's lifestyle.

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102. The method of claim 94 wherein the demographic information includes an

indication of the user's interests.

103. The method of claim 94 wherein the demographic information includes a coded indication for the user.

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104. The method of claim 69 wherein at least certain of the obtained information includes credit data.

10 105. The method of claim 104 wherein the credit data is obtained for both the primary transaction and the upsell transaction while accessing the database for the primary transaction.

15 106. The method of claim 69 wherein at least certain of the obtained information includes inventory data.

107. The method of claim 69 wherein at least certain of the obtained information includes possession data.

20 108. The method of claim 107 wherein at least certain of the possession data includes set data.

109. The method of claim 108 wherein the set data includes data relating to household items.

25 110. The method of claim 107 wherein at least certain of the second data element is obtained from a local database.

111. The method of claim 110 wherein the database provides raw data.

30 112. The method of claim 110 wherein the database provides analyzed data.

113. The method of claim 107 wherein at least certain of the second data element is obtained from a remote database.

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114. The method of claim 113 wherein the database provides raw data.

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115. The method of claim 113 wherein the database provides analyzed data.

116. The method of claim 107 wherein at least certain of the second data element is obtained from a calendar.

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117. The method of claim 107 wherein at least certain of the second data element is obtained from a clock.

118. The method of claim 107 wherein the system further includes a correlating unit for correlating at least certain of the primary transaction data with other identification data.

119. The method of claim 107 wherein the system further includes a correlating unit for correlating at least certain of the primary transaction data with other designators for database accessing.

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120. The method of claim 69 wherein the determining unit applies negative rules when the at least one good or service item for prospective upsell to the prospective customer is selected.

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121. The method of claim 120 wherein the negative rule includes not offering for upsell an item determined to already be possessed by the user.

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122. The method of claim 69 wherein the determining unit for determining the at least one good or service item is performed in automatic response to the occurrence of a primary transaction.

123. The method of claim 69 wherein the transaction type of the primary transaction is different from the upsell transaction.

5 124. The method of claim 123 wherein the primary transaction is a service transaction and the upsell is a sales transaction.

125. The method of claim 123 wherein the primary transaction is a sales transaction and the upsell is a sales transaction.

10 126. The method of claim 69 wherein the determining unit generates more than one good or service item for offer to the user.

15 127. The method of claim 126 wherein the more than one good or service is presented for selective presentation to the user.

128. The method of claim 127 wherein the selection as to presentation is made by the telemarketer.

20 129. The method of claim 128 wherein the selection as to presentation is made by the system user.

130. The method of claim 126 wherein the primary transaction is consummated.

131. The method of claim 126 wherein the upsell transaction is consummated.

25 132. The method of claim 126 wherein the upsell transaction supplants the primary transaction.

30 133. The method of claim 126 where both the primary transaction and the upsell transaction are consummated.

134. The method of claim 126 wherein if a transaction is consummated, a shipping unit effects shipping of the item.

135. The method of claim 134 wherein if a transaction is shipped, a tracking unit 5 provides user accessible tracking information.

136. The method of claim 134 wherein if a transaction is consummated, a billing unit effects billing for the item.

10 137. The method of claim 134 wherein if a transaction is consummated, an inventory unit updates information regarding the item.

15 138. The method of claim 134 wherein data relating to the upsell is provided to the determining unit and utilized in future determination of upsells.

139. A method for the real time, intelligent selection of information for provision to users of the system, in a remote communication environment, utilizing an electronic communications device, such as a telephone, videophone or computer, comprising the steps of:

20 establishing communication via the electronic communications device between the user and the system for purpose of an initial transaction,

25 obtaining transaction data with respect to the user from the initial transaction, including at least determining certain information regarding the identity of the user,

providing information relating to said information regarding the identity of the user to an external database,

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obtaining at least a second data element from said external database, relating

to the user for the intelligent selection of information for provision to the user,

utilizing at least in part the transaction data and the second data element and selecting the information for provision to users of the system, and

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providing the information to the user.

140. The method for the real-time, intelligent selection of information for provision to users of the system of claim 139 wherein the information relates to goods.

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141. The method for the real-time, intelligent selection of information for provision to users of the system of claim 139 wherein the information relates to services.

142. A method for presentation of information to users of an electronic system comprising the steps of:

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establishing communication between a user of the system and the electronic system,

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determining characteristics of the user based at least in part upon the communication between the user of the system and the electronic system,

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determining the mode of presentation for the user based at least in part on the determined characteristics of the user, and

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presenting the information to the user in the determined mode.

143. The method for the presentation of information to users of an electronic system of claim 142 wherein the mode of presentation for the user differs from the mode of presentation to other users based on the user's demographic information.

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144. The method for the presentation of information to users of an electronic system

of claim 142 wherein the mode of presentation for the user differs from the mode of presentation to other users based on the user's age.

145. The method for the presentation of information to users of an electronic system
5 of claim 142 wherein the mode of presentation for the user differs from the mode of presentation to other users based on the user's sex.

146. The method for the presentation of information to users of an electronic system
of claim 142 wherein the mode of presentation for the user differs from the mode of
10 presentation to other users based on the user's income.

147. The method for the presentation of information to users of an electronic system
of claim 142 wherein the mode of presentation for the user differs from the mode of presentation to other users based on the user's occupation.

15 148. The method for the presentation of information to users of an electronic system
of claim 142 wherein the mode of presentation for the user differs from the mode of presentation to other users based on the user's education level.

20 149. The method for the presentation of information to users of an electronic system
of claim 142 wherein the mode of presentation for the user differs from the mode of presentation to other users based on the user's family status.

25 150. The method for the presentation of information to users of an electronic system
of claim 142 wherein the mode of presentation for the user differs from the mode of presentation to other users based on the user's lifestyle.

30 151. The method for the presentation of information to users of an electronic system
of claim 142 wherein the mode of presentation for the user differs from the mode of presentation to other users based on the user's interests.

152. The method for the presentation of information to users of an electronic system of claim 142 wherein the mode of presentation for the user differs from the mode of presentation to other users based on the user's coded indication.

5 153. The method for the presentation of information to users of an electronic system of claim 142 wherein the mode of presentation for the user differs from the mode of presentation to other users based on the user's credit data.

10 154. A method for the real-time presentation of information to users of a system, in a remote communication environment, utilizing an electronic communications device, such as those selected from the group comprising telephones, videophones, and computers, comprising the steps of:

establishing communication via the electronic communication device between the user and the system for purpose of a purchase transaction,

15 selecting a second potential purchase transaction for presentation to the user, providing a presentation to the user of information relating to the second potential transaction, the presentation to the user including textual information data and at least one graphical depiction relating to the second potential transaction.

20 155. The method of claim 154 for the real time presentation of information to users of a system further including audio communication.

156. The method of claim 155 for the real time presentation of information to users of a system wherein the audio communication is one-way communication.

157. The method of claim 156 for the real time presentation of information to users of a system wherein the audio communication is from the system to the user.

158. The method of claim 156 for the real time presentation of information to 5 users of a system wherein the audio communication is from the user to the system.

159. The method of claim 155 for the real time presentation of information to users of a system wherein the audio communication is two-way communication.

10 160. The method of claim 154 for the real time presentation of information to users of a system wherein the graphical depiction includes a still image.

161. The method of claim 154 for the real time presentation of information to users of a system wherein the graphical depiction includes motion.

15 162. The method of claim 161 for the real time presentation of information to users of a system wherein the graphical depiction includes video.

163. The method of claim 162 for the real time presentation of information to 20 users of a system wherein the video includes video of the goods comprising the second potential transaction.

164. The method of claim 154 for the real time presentation of information to users of a system wherein the graphical depiction includes a created image

165. A method for the real-time presentation of information to users of a system, in a remote communication environment, utilizing an electronic communications device, such as those selected from the group comprising telephones, videophones, and computers, comprising the steps of:

- 5 establishing communication via the electronic communication device between the user and the system for purpose of a purchase transaction,
- selecting a second potential purchase transaction for presentation to the user,
- providing a presentation to the user of information relating to the second potential transaction, the presentation to the user including textual information data and at least one
- 10 dynamic video depiction relating to the second potential transaction.

166. The method of claim 154 for the real time presentation of information to users of a system further including audio communication.

15 167. The method of claim 155 for the real time presentation of information to users of a system wherein the audio communication is one-way communication.

168. The method of claim 156 for the real time presentation of information to users of a system wherein the audio communication is from the system to the user.

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169. The method of claim 156 for the real time presentation of information to users of a system wherein the audio communication is from the user to the system.

170. The method of claim 155 for the real time presentation of information to users of a system wherein the audio communication is two-way communication.

171. The method of claim 162 for the real time presentation of information to 5 users of a system wherein the video includes video of the goods comprising the second potential transaction.